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Foreign CROPS AND MARKETS



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FOR RELEASE

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UNITED STATES DEPARTMENT OF AGRICULTURE
OFFICE OF FOREIGN AGRICULTURAL RELATIONS
WASHINGTON 25, D.C.

L A T E N E W S

At the Third Meeting of the International Wool Study Group in London on November 7 to 9, it was noted that the postwar trend toward larger world wool production is continuing.

The meeting, which was attended by representatives of 25 countries and several observers from international organizations interested in wool, found that the world output of apparel wool approximated 2,959 million pounds in the 1948-49 season and estimated the output for the 1949-50 season at 3,015 million pounds. Adding the output of coarse wools, used primarily in carpets, the Group found that world output of all wool approximated 3,758 million pounds in 1948-49 and 3,844 million pounds in 1949-50.

The Group noted that consumption of apparel wool was off 8 percent in 1948-49 from the preceding year and that consumption in 1949-50 would be slightly below the 1948-49 figure.

It was estimated that on June 30, 1949 Government stocks amounted to 640 million pounds and commercial stock were 2,321 million pounds, and a tentative estimate for June 30, 1950 placed the Government stocks at 317 million pounds and commercial stocks at 2,131 million pounds.

(Continued on Page 548)

FOREIGN CROPS AND MARKETS

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U.S. FOREIGN TRADE IN AGRICULTURAL PRODUCTS DURING SEPTEMBER 1949

United States exports of agricultural products during September, the third month of the 1949-50 fiscal year, were valued at \$245,900,000 compared with \$244,300,000 in the preceding month and with \$269,700,000 during September 1948. The nation's exports of all commodities, both agricultural and nonagricultural, were valued at \$895,400,000 during September this year. Agricultural products accounted for 27 percent of the total.

Wheat and wheat flour continued in first place among the agricultural exports for the month under review, but at a total value of only \$78,000,000 compared with \$88,500,000 during the preceding month and \$128,700,000 during September a year ago. Leaf tobacco continued in second place with exports valued at \$40,400,000 compared with \$29,800,000 during August and \$26,300,000 in September a year ago. Cotton exports, the third most important item in the nation's shipments of agricultural products to foreign countries during September, were valued at \$36,000,000 compared with \$28,300,000 in August and \$30,300,000 in September last year.

On a quantitative basis, the outstanding features of the September exports compared with those for the same month a year ago, were the large increases in a number of items (especially nonfat dry milk solids, pork, lard, tallow, fresh apples and pears, barley, corn, grain sorghums, rice, soybeans and soybean oil, bright flue-cured tobacco and dried peas), and the substantial reductions in a number of other items (especially cheese, whole dried milk, evaporated milk, horse meat, fresh grapefruit and oranges, prunes, raisins and currants, wheat flour, soybean flour, dried beans and white potatoes).

United States imports of agricultural products during September this year were valued at \$240,300,000 compared with \$225,200,000 during August and \$261,000,000 in September last year. The nation's imports of all commodities, both agricultural and nonagricultural, were valued at \$529,300,000 during the month under review. Agricultural products accounted for 45 percent of the total. Heading the list and far in the lead of any other individual commodity were coffee, sugar, wool, and rubber. Especially significant is the fact that September imports of agricultural products were only \$5,600,000 under the value of the exports. In the preceding month, imports were \$19,100,000 under exports while in September a year ago they were \$8,700,000 under the exports.

On a quantitative basis, the outstanding developments in agricultural imports revealed by the September figures were the large increases in imports of such products as dutiable wool, prepared and preserved pineapples, barley malt, copra, coconut oil, palm oil, molasses unfit for human consumption, coffee, cocoa and cacao beans and spices. On the other hand, imports of such products as Brazil nuts, tung oil, white potatoes, wool (unmanufactured, free in bond), and rubber show substantial reductions.

UNITED STATES: Summary of exports, domestic, of selected
agricultural products during September, 1948 and 1949

Commodity exported	Unit	September			
		Quantity		Value	
		1948	1949	1948	1949
				1,000	1,000
ANIMAL PRODUCTS:		Thousands:	Thousands:	dollars:	dollars
Butter	Lb.: 481	408		382	280
Cheese	Lb.: 14,758	2,519		7,027	918
Milk, condensed	Lb.: 6,342	5,692		1,312	1,222
Milk, whole, dried	Lb.: 8,923	5,449		4,747	2,834
Nonfat dry milk solids	Lb.: 10,587	44,267		1,712	5,783
Milk, evaporated	Lb.: 33,486	12,368		5,107	1,580
Eggs, dried	Lb.: 1,325	1,852		527	1,774
Beef and veal, total 1/.....	Lb.: 2,203	2,260		857	618
Pork, total 1/.....	Lb.: 1,773	4,342		775	1,396
Horse meat	Lb.: 17,213	2,273		2,762	355
Lard (including neutral)	Lb.: 14,513	32,682		3,557	4,697
Tallow, edible and inedible	Lb.: 7,223	35,609		1,201	3,012
VEGETABLE PRODUCTS:					
Cotton unmd. excl. linters (480 lb.):	Bale: 2/ 180	222		30,348	36,027
Apples, fresh	Lb.: 2,100	4,541		179	334
Grapefruit, fresh	Lb.: 6,849	2,464		197	108
Oranges, fresh	Lb.: 32,940	25,938		1,190	1,137
Pears, fresh	Lb.: 1,072	2,119		122	148
Prunes, dried	Lb.: 36,012	790		2,899	107
Raisins and currants	Lb.: 11,179	2,088		1,004	281
Fruits, canned	Lb.: 9,555	9,562		1,602	1,440
Fruit juices	Gal.: 825	1,173		636	1,091
Barley, grain (48 lb.)	Bu.: 1,361	3,089		2,876	4,053
Barley malt (34 lb.)	Bu.: 285	291		920	665
Corn, grain (56 lb.)	Bu.: 457	7,082		913	10,888
Grain sorghums (56 lb.)	Bu.: 1,382	3,626		2,786	4,916
Rice, milled, brown, etc.....	Lb.: 39,930	60,104		3,679	4,103
Wheat, grain (60 lb.)	Bu.: 34,732	30,082		90,531	71,195
Flour, wholly of U.S. wheat (100 lb.):	Bags: 6,281	1,370		37,947	6,264
Flour, other (100 lb.)	Bags: 36	95		251	543
Hops	Lb.: 313	221		200	151
Peanuts, shelled	Lb.: 6,709	7,869		1,186	938
Soybeans (except canned)	Lb.: 143	130,967		10	6,124
Soybean oil, crude and refined ...	Lb.: 3,591	14,023		956	2,100
Soybean flour, edible	Lb.: 46,482	122		2,916	7
Seeds, field and garden	Lb.: 2,756	3,131		625	791
Tobacco, bright flue-cured	Lb.: 41,791	69,928		23,395	36,488
Tobacco, leaf, other	Lb.: 6,040	6,779		2,864	3,971
Beans, dried	Lb.: 8,079	3,984		804	347
Peas, dried	Lb.: 15,544	28,852		1,128	1,392
Potatoes, white	Lb.: 60,084	48,015		1,341	1,289
Vegetables, canned	Lb.: 4,198	5,389		647	907
Total above				244,116	222,274
Food exported for relief, etc.....				3,874	1,608
Other agricultural products				21,730	22,046
Total agricultural				269,722	245,928
Total all commodities				915,246	895,392

1/ Product weight. 2/ 500 - lb. bales. Compiled from official records of the Bureau of the Census.

UNITED STATES: Summary of imports for consumption of selected
agricultural products during September 1948 and 1949

Commodity Imported SUPPLEMENTARY	Unit:	September			
		Quantity		Value	
		1948	1949	1948	1949
		Thousands	Thousands	dollars	dollars
ANIMALS AND ANIMAL PRODUCTS:					
Cattle, dutiable.....	No.	109	34	17,112	4,129
Cattle, free (for breeding).....	No.	4	2	1,030	604
Casein and lactarene.....	Lb.	2,273	3,663	501	502
Cheese.....	Lb.	1,193	2,442	819	1,312
Hides and skins.....	Lb.	14,982	15,400	6,760	6,402
Beef, canned incl. corned.....	Lb.	9,340	6,605	3,020	2,121
Wool, unmd, excl. free, etc.....	Lb.	23,456	29,295	13,057	19,438
VEGETABLE PRODUCTS:					
Cotton unmd. excl. linters (480 lb.)..	Bale	98	56	26,434	9,406
Jute and jute butts, unmd. (2,240 lb.)..	Ton	3	1/	1,050	125
Apples, green or ripe (50 lb.).....	Bu.	58	7	136	18
Olives in brine.....	Gal.	856	266	1,333	553
Pineapples, prep. or preserved.....	Lb.	4,537	14,261	1,040	1,617
Barley malt.....	Lb.	2,241	4,801	163	241
Hops.....	Lb.	11	17	10	17
Almonds, shelled.....	Lb.	440	144	159	45
Brazil or cream nuts, not shelled....	Lb.	12,236	9,276	1,307	882
Cashew nuts.....	Lb.	2,850	2,150	1,239	793
Coconut meat, shredded, etc.....	Lb.	6,759	10,659	1,502	1,418
Castor beans.....	Lb.	29,697	26,819	1,770	1,273
Copra.....	Lb.	35,513	102,501	4,707	7,215
Flaxseed (56 lb.).....	Bu.	25	0	139	0
Coconut oil.....	Lb.	7,024	17,020	1,305	2,102
Palm oil.....	Lb.	4,332	9,701	777	1,072
Tung oil.....	Lb.	10,860	4,226	1,952	723
Sugar, excl. beet (2,000 lb.).....	Ton.	316	227	30,934	28,297
Molasses, unfit for human consumption.	Gal.	7,070	10,978	1,399	717
Tobacco, cigarette leaf.....	Lb.	5,844	5,567	4,518	4,047
Tobacco, other leaf.....	Lb.	1,589	1,504	2,406	2,121
Potatoes, white.....	Lb.	14,374	9,986	295	177
Tomatoes, natural state.....	Lb.	68	185	3	4
COMPLEMENTARY					
Wool, unmd., free in bond.....	Lb.	31,067	9,957	9,098	3,065
VEGETABLE PRODUCTS:					
Bananas.....	Bunch	4,884	4,711	4,072	4,769
Coffee (ex. into Puerto Rico).....	Lb.	186,448	254,959	46,645	66,029
Cocoa or cacao beans and shells.....	Lb.	17,774	25,207	6,250	4,588
Tea.....	Lb.	3,781	8,443	1,997	4,242
Spices (complementary).....	Lb.	2,706	6,049	1,339	3,122
Sisal and henequen (2,240 lb.).....	Ton.	7	43	2,058	2,553
Rubber, crude.....	Lb.	113,245	102,189	22,294	15,165
Total above.....				220,670	200,954
Other agricultural products.....				40,330	39,313
Total agricultural products....				261,000	240,267
Total all commodities.....				590,020	529,312

1/ Less than 500. Compiled from official records of the Bureau of the Census.

WORLD DRIED APPLE PRODUCTION AGAIN BELOW AVERAGE

The 1949 preliminary estimate of dried apple production in the 5 leading commercial producing countries is 12,100 short tons compared with 10,800 tons (revised) in 1948 and 20,200 tons in 1947. The estimate is about 47 percent below the 10-year (1938-47) average of 23,000 tons and 44 percent below the 5-year (1943-47) average of 21,600 tons. The preliminary estimate for the United States based on information of Trade sources is 9,500 tons which, while above that of last year, is less than half the prewar average and less than one-third of the all-time record of 34,000 tons in 1928. Production estimated for Australia and Canada are down from those of a year ago. No change is reported in production for New Zealand and the Union of South Africa.

Australia

The production of dried apples in Australia was down about one-third from that of the previous year primarily because of the small fresh apple crop in Tasmania. The production of dried apples in Tasmania, usually about 90 percent of the country's total, was the smallest in some years. Dried apples are produced on a small scale in South and Western Australia. The dried apple pack in Australia in normal times usually is sold mostly in the domestic market. During the war when the exportation of fresh apples was suspended, the production of dried apples was greatly increased. The exportation of dried apples increased from 88 tons in 1938-39 to 1,038 tons in 1946-47. During the 1948 season exports totalled 1,026 short tons.

Production of dried apples from 1920 to 1939 averaged about 500 short tons. In 1940 production increased to 600 tons and reached an all time high of 2,300 tons in 1944. It is probable that production will decline gradually in the years ahead as fresh fruit exports increase.

During the 1949 export season to July 1, 108,144 pounds were exported at a value of £8,957 (about U.S. 27 cents per pound). Sweden was the principal destination with 70,280 pounds. Egypt and Jamaica both purchased 11,000 pounds, and the balance were exported to other British areas, mostly in the South Pacific. Exports for the balance of the season are expected to be very light. The bulk of this year's pack will be consumed in the domestic market.

Canada

The production of dried apples in Canada is generally the world's second largest although considerably below that of the United States. In Canada, the principal producing areas are in British Columbia and Nova Scotia. The consumption of dried apples in Canada is relatively large in proportion to its population. Relatively large quantities are consumed annually in frontier areas, mining and logging camps. Exports of dried apples have been made to the United Kingdom under normal conditions. It is estimated that domestic consumption averages about 1,800 tons a year. There were no stocks from the 1948 pack available when the 1948-49 season came to a close.

APPLES, DRIED: Estimated commercial production in specified countries,
1949 with comparisons

(Rounded to nearest 100 short tons)

Year	Australia	Canada	New Zealand	Union of South Africa	Foreign total	United States	World total
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average</u>							
1938-47	1,300	4,100	1/	200	2/ 5,600	17,400	23,000
1943-47	1,900	3,900	1/	100	2/ 5,900	15,700	21,600
<u>Annual</u>							
1943	1,900	6,500	1/	200	2/ 8,600	17,500	26,100
1944	2,300	6,700	200	200	9,400	17,000	26,400
1945	2,000	800	200	100	3,100	14,500	17,600
1946	2,000	2,200	200	100	4,500	14,500	19,000
1947	1,500	3,300	300	100	5,200	15,000	20,200
1948 3/	1,800	4/ 1,000	200	100	4/ 3,100	4/ 7,700	4/ 10,800
1949 3/	1,200	1,100	200	100	2,600	9,500	12,100

1/ No production prior to 1944.

2/ Excluding New Zealand.

3/ Revised.

OFAR, USDA. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research or other information.

UNITED STATES: Exports of dried apples

(Crop year, August-July)

Country	Average		Annual			
	1939/40-	1944/45-	1946-47	1947-48	1948-49	1949-50
	1948/49	1948/49				1/
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
France	14	25	1	2/	0	0
Netherlands	349	43	53	121	18	9
Norway	57	60	0	16	7	5
Sweden	396	284	1,421	0	0	0
United Kingdom	2,533	1,459	2,545	439	0	0
Canada	79	139	277	352	3	2
Other	961	706	695	475	474	122
Total	4,389	2,716	4,992	1,403	502	138

1/ 2 months only, August and September.

2/ Less than $\frac{1}{2}$ ton.

Compiled from official records of the Bureau of the Census.

The size of the 1949 season production is problematical. In British Columbia it is now estimated some 600 tons will be dried, or about the same quantity as in 1945. This estimate is based upon preliminary reports from that province and the fact that a large apple crop has been harvested and is creating a surplus problem. In Nova Scotia considerable doubt exists as to the probable pack of dried apples this season. There is some concern on the part of the large users, such as the logging, mining, and fishing industries, as to the quantity that will be available. Last season about 600 tons were packed in Nova Scotia. However, on basis of information at hand, it appears the pack this season may be slightly less and may not cover the requirements of the Maritime provinces. At the start of the season in Nova Scotia it was thought that less than 200 tons of dried apples would be produced. On November 9, however, it was found that more apples would be available than expected and it is now thought about 500 tons of dried apples will be produced this season. Requests have been made in the Maritime provinces for permits to import dried apples from the United States, but permission was not granted and most likely will not be due to the currency situation. The production of dried apples in Nova Scotia will not be subsidized.

In contrast to this season's situation, last year Canada exported 207 tons, of which 205 tons were to the United States, one and one-half tons to Newfoundland (now a part of Canada) and the remaining half-ton to other countries. The United Kingdom did not purchase Canadian dried apples in either 1948 or 1949. The United Kingdom in the prewar and war years was generally the principal foreign buyer of Canadian dried apples. In 1944-45 when Canadian production was 6,700 tons the United Kingdom purchased 2,677 tons. At present it is believed the United Kingdom will not purchase Canadian dried apples this season and that the production will be entirely consumed in Canada. The production in British Columbia in excess of local needs will no doubt be shipped east to other provinces even though the price may be a little higher than the Nova Scotia product or imported dried apples from the United States.

Argentina-Chile

In Argentina the production in 1949 was about 11 short tons all of which will be used in the country.

The production of dried apples in Chile in 1949 was about 28 short tons all of which were consumed in the domestic market. The production of this dried fruit has been about the same each season for the past 10 years.

New Zealand

The New Zealand dried apple industry, started as a wartime emergency measure to dispose of surplus fresh apples and to reduce imports, is designed to meet the domestic needs. Production and demand have been in good balance each year since the industry started. The Marketing Department, which is operating the plants, has found that hotels, bakers and similar bulk users were the best customers. It has concentrated on packs designed for the large users. It also puts out half-pound packages for retail trade. The output of the plant in Motueka is delivered to

buyers as soon as it is packed, and the plant seldom has unsold stock on hand. There are no exports of dried apples in significant tonnages, nor is there any plan to expand production for export. The Marketing Department plans to process about the same tonnage from the 1950 crop of apples which will be harvested in February and March.

Union of South Africa

The dried apple production of the Union of South Africa has been a by-products deal from the very start of the industry. Production this season was only 148,533 pounds compared with 291,109 pounds a year ago. The entire output is sold in the domestic market with occasional small shipments to nearby Rhodesia and other British African areas. The decline in production this year is attributed to a smaller fresh apple crop and heavier exports of fresh fruit to the United Kingdom.

United States

The production and export of dried apples in the United States has been declining slowly in the past quarter of a century. Before World War II, exports of dried apples averaged better than 12,000 tons annually, of which European countries purchased about 90 percent. During the war, average annual exports were about 5,500 tons, of which the United Kingdom purchased about 85 percent. In the postwar period, United States exports of dried apples dropped sharply. In 1946-47 a total of 4,992 tons were exported, of which 2,545 tons were to the United Kingdom. In 1947-48 exports had declined to 1,403 tons and in 1948-49 to 502 tons, or less than 4 percent of the 1934-38 average. The outlook at present for exports during the 1949-50 season are about the same as those of last season. During August and September 1949 138 tons were exported, of which 56 tons were to Indonesia, 19 tons to Japan, and 21 tons to Switzerland.

The principal drawback to increased exports is the lack of dollar exchange in most countries. There is practically no competition in European markets with dried apples produced in other countries. A few are shipped to the United Kingdom from Australia and Canada but offer no serious competition.

WORLD 1949 DRIED APRICOT OUTPUT UP SLIGHTLY

The 1949 preliminary estimate of dried apricot production in the United States, Iran, Australia, and other leading commercial producing countries is 22,000 short tons compared with 20,700 tons (revised) in 1948 and 26,300 tons (revised) in 1947. The estimate is 34 percent below the 10-year (1938-47) average of 33,200 tons and 26 percent below the 5-year (1943-47) average of 29,900 tons. Increases in production are reported for the United States and Iran, while Australia's output remains the same as a year earlier. All other countries report a smaller production, with Spain having the sharpest drop, followed by Syria.

APRICOTS, dried: Estimated commercial production in specified countries, 1949 with comparisons

(Rounded to nearest 100 short tons)

Year	Argentina and Chile	Australia	Iran	Spain	South Africa	Syria	Foreign total 1/	United States 1/	World total 1/
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
<u>Average</u>									
1938-47	300	1,700	7,800	3,200	700	800	14,500	18,700	33,200
1943-47	500	1,500	7,100	4,800	600	700	15,200	14,700	29,900
<u>Annual</u>									
1943	500	1,400	9,900	5,500	700	1,000	19,000	6,600	25,600
1944	400	2,100	9,300	9,600	900	800	23,100	25,600	48,700
1945	700	900	3,900	2,600	700	600	9,400	7,800	17,200
1946	300	1,500	8,200	2,200	100	600	12,900	18,100	31,000
1947	600	1,400	4,400	3,900	300	500	11,100	15,200	26,300
1948 2/	500	1,100	3,800	1/ 1,500	400	1,000	8,300	12,400	20,700
1949 2/	300	1,100	6,400	400	300	500	9,000	13,000	22,000

1/ Revised.

2/ Preliminary.

OFAR, USDA. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information.

UNITED STATES: Exports of dried apricots

(Crop year, August-July)

Countries	Average		Annual			
	1939/40- 1948/49	1944/45- 1948/49	1946-47	1947-48	1948-49	1/ 1949-50
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Belgium	461	720	896	844	1,082	299
Denmark	228	4	2/	2	17	28
France	346	61	1	23	40	2/
Netherlands	241	72	73	122	166	16
Norway	118	59	0	20	5	1
Sweden	173	55	277	2/	0	0
United Kingdom	1,949	1,038	35	2/	1	2/
Canada	554	343	1,269	199	147	2
Other	1,337	1,237	876	1,193	1,389	311
Total	5,407	3,589	3,427	2,403	2,847	617

1/ 3 months, July through September.

2/ Less than $\frac{1}{2}$ ton.

Compiled from official records of the Bureau of the Census.

The reduction in output in Spain was the result of an exceptionally heavy demand for apricot pulp. The demand for apricot paste in Syria and a short fresh apricot crop brought about a smaller output of dried apricots in that country. In South Africa the heavy demand for fresh fruit by the canneries reduced the quantity available for drying.

The disposal of the 1948 pack in the foreign countries was relatively satisfactory with carry-overs reported from only two countries. Iran is reported to have had a 900-ton carry-over and Spain, 200 tons. The official trade statistics for most of these countries is not available at this time. Exports from the foreign countries for the season, based on trade estimates, for the most part totaled about 3,200 short tons, of which Iran produced about half. Export of dried apricots from the United States totaled 2,847 tons. The principal buyers of dried apricots were Belgium, Germany, France, the Netherlands, the United Kingdom, and Denmark.

The 1949-50 export season in Spain is almost over, with practically all available exportable supplies sold to Denmark. The small packs in Argentina, Chile, and the Union of South Africa are expected to be almost entirely consumed in the domestic markets of those countries. Australia has exported 281 tons of dried apricots to date, of which 98 percent were to New Zealand. This about completes the export movement for the year. Iran is reported to be experiencing a slow market so far this year but anticipates some business from Germany and the United Kingdom. The United States, during the first quarter of the 1949-50 season, has exported 617 short tons, compared with 1,101 tons to the same date last season and a 1948-49 season total of 2,847 tons. This comparison is a little misleading because of large shipments made to Germany last year under export program. The continued shortage of dollar exchange in the principal European countries is expected again to limit dried apricot exports during the present export season.

Australia

The 1949 preliminary estimate of dried apricot production in Australia is 1,100 short tons, the same as in 1948. The estimate is 41 percent below the 10-year (1938-47) average of 1,700 tons and 34 percent below the 5-year (1943-47) average of 1,500 tons. The small fresh apricot crop in South Australia and New South Wales resulted in less drying in those States while in Victoria a substantial increase is reported. South Australia is the largest producer of dried apricots. Production in South Australia this year is estimated to have totaled 983 short tons.

The 1948 pack for all practical purposes was disposed of before new-crop fruit came to market. Exports during the 1948 season totaled 391 short tons. The indicated domestic consumption from the 1948 pack is 719 short tons.

Exports from the 1949 pack to July 1 totaled 281 short tons, of which New Zealand purchased 276 tons. The balance was exported in very small quantities to other areas, mostly British possessions in the South Pacific and India. On the basis of present information it appears likely that the remaining stocks will be consumed in Australia.

Argentina

The 1949 preliminary estimate of dried apricot production in Argentina is 100 short tons, compared with 300 tons in 1948 and 400 tons in 1947. The production estimate is 50 percent below the 10-year (1938-47) average of 200 tons and 66 percent below the 5-year (1943-47) average of 300 tons. The very small output of dried apricots this season will be entirely consumed in Argentina. During the 1948 season less than a ton was exported.

Chile

The production of dried apricots in Chile has remained at an estimated 200 tons during the last two years and was estimated at 100 to 200 tons for some years prior to that. About 70 percent of the production comes from the northern valleys and the balance from the central valley. Production is primarily for the domestic market. Exports during 1948 and 1947 amounted to less than one ton. The domestic market is expected to consume the entire 1949 pack. Late in September prices in retail markets in Santiago were from 25 to 36 pesos per 2.2 pounds (about U.S. 26 to 38 cents per pound) depending on variety and quality.

Iran

The 1949 production of dried apricots in Iran is estimated to have totalled about 6,400 tons compared with 3,800 tons in 1948 and 4,400 tons in 1947. The estimate is 18 percent below the 10-year (1938-47) average of 7,800 tons and 10 percent below the 5-year (1943-47) average of 7,100 tons.

The 1948 pack was not entirely disposed of before new-crop fruit became available this year. It is reported some 900 tons were carried over. Domestic consumption was estimated to have totaled about 1,400 short tons and exports totalled 1,746 tons. The United Kingdom purchased about 429 short tons, and Germany 315 tons, the Netherlands 197 tons. The balance was sold in various other countries mostly in the Near East.

The Iranian Seven Year plan proposes to provide preliminary fruit processing and drying plants in the orchard areas, in order to cut down the large losses which now occur in handling the fruit. The plan also recommends the erection of 5 final processing and packing plants, two with capacities of 6,600 tons of dried fruit each, 3 with capacities of 2,700 tons each. The two larger plants will be constructed in Azerbaijan province, the most important fruit area in the country.

The export market early in the 1949-50 season was rather slow. Exporters anticipate sales to Germany and the United Kingdom as well as to other countries. There is some doubt that the probable exportable surplus of 5,500 tons will move this season and a substantial carry-over into 1950 season is anticipated.

Spain

The production of dried apricots in Spain dropped sharply from that of the previous 7 years. The 1949 preliminary estimate is 400 tons compared with 1,500 tons in 1948 (revised) and 3,900 tons in 1947. The estimate is only 12 percent of the 10-year (1938-47) average of 3,200 tons and 8 percent of the 5-year (1943-47) average of 4,800 tons. It is estimated that only 100 tons were produced in Murcia compared with 900 tons in 1948. The production in the Balearic Islands this year is placed at about 300 tons compared with 500 tons in 1948. No dried apricots were produced in Valencia this season.

The carry-over from the 1948 pack of dried apricots in the Murcia district was a little under 200 tons. There was an insignificant quantity still on hand in the Balearics. All of those stocks that are of an exportable nature are expected to be lifted by the British.

The production of dried cots in Spain was heavy during the period 1940 to 1948 because of the difficulty in disposing of apricot pulp and securing tin plate during the war. Prior to 1940, production of dried apricots was rather small and was almost entirely consumed in the domestic market. This season the British Purchasing Mission purchased 15,803 short tons of apricot pulp in Murcia and Valencia (Murcia 14,162 tons, Valencia 1,641 tons). An additional tonnage of apricot pulp was processed in the Balearics. These heavy purchases of pulp and relatively heavy fresh consumption left few fresh apricots for drying and account for the decline in production.

The 1949-50 marketing season so far has been very active. In addition to the large tonnage of pulp purchased by the British in Murcia and Valencia 550 tons were sold to France and Denmark from the Balearics and an additional 1,100 tons are expected to be shipped to Germany in the near future. The available supply of pulp will be exhausted before the end of the year. The 1949-50 exportation of dried apricots is about completed, with Denmark reported to have purchased the entire output in the Balearics. The small pack in Murcia probably will find ready sale in the domestic market so that from the international trade point of view the export season is over. This is the first season in the past 8 years that stocks have been completely sold before new-crop fruit became available.

Union of South Africa

The 1949 production of dried apricots in the Union of South Africa is estimated to be 300 short tons compared with 400 tons in 1948 and 300 tons in 1947. The production estimate is 57 percent below the 10-year (1938-47) average of 700 tons and 50 percent below the 5-year (1943-47) average of 600 tons.

The decline in production this year is due to heavier purchases by canners of fresh fruit, leaving less for drying. The apricot crop was smaller than last year. The entire production, with the possible exception of very minor quantities exported to nearby areas, is expected

to be sold in the domestic market. The restriction on imports of dried fruit makes it necessary for consumers to purchase domestic fruit which in some cases is more expensive and not as well received. The prices to be paid producers is controlled by the Government.

United States

The 1949 production of dried apricots in the United States according to Trade sources will be about 13,000 tons or slightly above that of last year, which is now estimated to have totaled 12,400 tons. The present estimate, if it materializes, is 30 percent below the 10-year (1938-47) average of 18,700 tons and 12 percent below the 5-year (1943-47) average of 14,700 tons. United States production of dried apricots during the past 25 years has varied between a low of 6,600 tons in 1943 and an all time high of 41,000 tons in 1939. Postwar production has been considerably below the prewar average.

United States exports during the 10-years 1930-39 averaged 14,838 short tons, or about 49 percent of the average production for the period. Germany prior to 1934 was the principal buyer followed by France, the Netherlands and the United Kingdom. After 1934 France became the leading buyer and retained that position until the outbreak of the war. On the basis of present information, it appears some of the French imports of United States apricots were later shipped to Germany. In the 1940-41 season, exports dropped to 1,455 tons but starting with 1941-42 increased to an average of 6,652 tons during the war period. The United Kingdom was the principal buyer during the war period. The export of dried apricots during the postwar period (1945-49) averaged only 2,509 tons or about 19 percent of the 1934-38 average of 13,267 tons.

During the 1948-49 export season a total of 2,847 tons were exported from the United States. Belgium was the destination for 1,082 tons, Germany 833 tons and the Netherlands 166 tons. United States exports to non-European destinations totaled 572 tons, of which Canada, including New Foundland and Labrador, received 323 tons and Indonesia 98 tons. During the present season to October 1, a total of 617 tons had been exported with Belgium again the largest buyer with 259 tons and Switzerland second with 176 tons. Other leading buyers so far this season are Germany 50 tons. Brazil 44 tons, Indonesia 26 tons, and Denmark 28 tons. The lack of dollar exchange in most European countries will probably continue to restrict exports during 1949-50.

WORLD PEANUT PRODUCTION ESTABLISHES NEW RECORD 1/

World peanut production is expected to establish a new record in 1949, according to preliminary information available to the Office of Foreign Agricultural Relations. Total output is forecast at 11,460,000 short tons of unshelled nuts, representing an increase of 4 percent over the 1948 output of 11,000,000 and 20 percent over the prewar average of 9,550,000 tons. The sharp increase in India, the world's largest peanut producer, accounts for most of the expansion over 1948. Slightly larger harvests are also indicated for China, Indonesia, French West Africa, and Gambia. Sizeable decreases occurred in the United States, Nigeria, and Brazil.

Mexico's 1949 harvest has not been reported, but it is believed that the planted area was at least as large as in 1948. The demand for peanuts relative to that of other oilseeds has increased during the last year or two principally as a result of (1) the recent increase in the production of hydrogenated vegetable shortening, for which peanut oil is preferred and (2) the demand from abroad for Mexican peanuts for confectionery uses.

Peanut production in the United States dropped below the 1 million-ton mark for the first time since 1941. The November 1 report indicated a crop of 922,850 tons from 2,546,000 acres, or 21 percent less than last year's record of 1,169,000 tons from 3,311,000 acres. The 1949 forecast is practically the same as the 1938-47 average output. The yield per acre of 725 pounds, however, is considerably higher than the 706 pounds of 1948 and the 692-pound average of the previous 10 years.

Cuba's 1949 peanut crop, forecast at 8,500 tons, is almost 25 percent less than last year's and the smallest outturn since 1933. A reduction in planted acreage is primarily responsible for the decline. A second factor was the failure of considerable seed to germinate, reportedly because it was not shelled before planting.

Peanut production in the Dominican Republic, estimated at 19,800 tons is almost double the 1948 output. The record crop is due to an increase of 50 percent in area over 1948 and an increase of 30 percent in yield per acre. Weather conditions were almost ideal throughout the year.

China's 1949 peanut crop is forecast at 3,224,000 tons, 2 percent larger than last year's and approximately 10 percent above the prewar average. Farmers have been encouraged to increase the production of peanuts and other industrial crops.

Reports from India indicate a record harvest of about 4,200,000 tons, representing a 22-percent increase over 1948 and a 27-percent increase over prewar. The larger planted acreage is attributed to the high prices of peanuts prevailing at planting time.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations, United States Department of Agriculture, Washington 25 D. C.

PEANUTS 1/: Acreage and production in specified areas, year of harvest,
average 1935-39, annual 1945-49

Continent and country	Acreage 2/		Production											
	Average 1935-39	1945	1946	1947	1948	1949 3/	Average 1935-39	1945	1946	1947	1948	1949 3/	1948	1949 3/
NORTH AMERICA														
Mexico.....	33:	71:	73:	83:	-	-	12.2:	32.8:	36.7:	36.8:	38.6:	-	-	-
United States.....	1,659:	3,160:	3,142:	3,360:	3,311:	2,546:	614.7:	1,021.1:	1,019.2:	1,091.4:	1,169.2:	922.9	-	-
Cuba.....	-	118:	75:	86:	67:	40 1/4:	8.4:	23.5:	29.0:	23.5:	11.2:	8.5	-	-
Dominican Republic.....	-	44:	29:	43:	41:	62 1/4:	3.8:	10.0:	8.9:	9.0:	10.2:	19.8	-	-
Total 5/.....	1,800:	3,410:	3,340:	3,610:	3,520:	2,760:	640.0:	1,092.0:	1,099.0:	1,167.0:	1,235.0:	997.0	-	-
EUROPE														
Bulgaria 6/.....	5:	3:	4:	4:	-	-	2.2:	4.5:	1.3:	1.3:	-	-	-	-
Italy.....	2:	7:	7:	11:	10:	9 1/4:	1.6:	4.9:	4.4:	7.9:	7.2:	6.7	-	-
Spain.....	24:	15:	16:	-	-	-	23.3:	10.4:	12.1:	-	-	-	-	-
Total (excl. U.S.S.R.) 5/.....	35:	30:	30:	45:	45:	45:	28.0:	16.0:	18.0:	27.0:	27.0:	27.0:	-	-
U.S.S.R. (Europe and Asia)..... 4/.....	29:	-	-	-	-	-	-	-	-	-	-	-	-	-
ASIA														
Turkey.....	3:	4:	4:	-	6:	6 1/4:	1.9:	1.8:	1.9:	-	3.9:	1.0	-	-
Burma.....	784:	559:	572:	728:	657:	-	192.2:	126.6:	112.0:	171.1:	161.3:	-	-	-
China 8/.....	3,639:	3,214:	3,944:	3,913:	3,881:	-	142.913.4:	2,342.6:	3,039.4:	2,916.8:	3,160.4:	3,224.3	-	-
Manchuria.....	-	-	-	-	-	-	142.913.4:	-	-	-	-	-	-	-
French India.....	7:	7:	-	-	-	-	5.6:	6.1:	-	-	-	-	-	-
French Indochina.....	421:	-	-	-	-	-	16.0:	-	-	-	-	-	-	-
India.....	7,535:	10,273:	10,267:	10,079:	9,078:	-	3,295.7:	3,881.9:	4,018.6:	3,820.3:	3,441.8:	4,200.0	-	-
Japan.....	19:	-	-	13:	14:	17:	14.5:	19.8:	19.8:	5.3:	8.8:	9.9	-	-
Formosa.....	77:	-	-	-	-	-	57.7:	22.7:	-	-	-	-	-	-
Kwantung Leased Territory.....	101:	-	-	-	-	-	91.1:	92.4:	-	-	-	-	-	-
Indonesia 10/.....	572:	221:	326:	404:	-	-	289.1:	92.4:	116.6:	215.5:	272.8:	300.0	-	-
Philippine Republic.....	18:	-	19:	27:	34:	-	4.7:	-	3.8:	5.6:	8.2:	-	-	-
Siam.....	-	16:	22:	24:	-	-	-	5.2:	8.5:	9.7:	9.7:	-	-	-
Total (excl. U.S.S.R.) 5/.....	13,200:	14,800:	15,600:	15,680:	14,650:	16,200:	7,040.0:	6,689.0:	7,532.0:	7,360.0:	7,280.0:	8,130.0	-	-

SOUTH AMERICA													
Argentina.....	4/	207:	351:	381:	294:	304:11/	469:	87.3:	174.4:	153.3:	117.8:	132.3:	130.0
Brazil.....	4/	-	100:	84:	-	-	-	14.8:	31.5:	34.5:	55.2:	154.0:	115.7
Paraguay.....	4/	29:	14:	-	-	-	84/	19.4:	4.8:	5.0:	1.7:	1.1:	2.9
Uruguay.....	4/	5:	15:	15:	21:	34:	49:	1.2:	5.4:	4.8:	4.8:	10.6:	11.5
Total 5/.....	4/	400:	550:	550:	500:	750:	820:	129.0:	283.5:	205.0:	187.0:	305.0:	267.0
AFRICA													
Anglo-Egyptian Sudan.....	4/	43:	-	-	-	-	-	8.1:	1.7:	6.7:	8.6:	7.6:	-
Belgian Congo.....	4/	24:	-	534:	546:	570:	-	65.1:	-	-	-	-	-
Tanganyika.....	4/	27:	-	-	-	-	-	23.4:	7.8:	4.7:	16.5:	9.1:	10.8
Uganda.....	4/	156:	357:	357:	210:	247:	-	2.2:	-	-	-	-	-
Gambia.....	4/	-	-	-	210:	210:	210:9/	58.1:	-	63.2:	78.4:	69.4:	80.0
Egypt.....	4/	23:	25:	25:	26:	24:	-	17.2:	20.7:	16.9:	20.6:	19.9:	-
French Equatorial Africa.....	4/	388:	-	-	-	-	-	58.8:	-	-	-	-	-
French West Africa.....	4/	2,955:	-	-	-	-	-	875.9:	506.0:	559.4:	780.0:	780.0:	790.0
Madagascar.....	4/	14:	31:	30:	25:	-	-	6.6:	8.8:	8.8:	8.0:	-	-
Mozambique.....	4/	-	-	-	-	-	-	42.9:9/	33.3:9/	26.4:	36.4:	-	-
Nigeria and Cameroons.....	4/	-	2,500:	2,500:	2,500:	2,675:	-	394.7:	616.0:	616.0:	560.0:	616.0:	550.0
Angola.....	4/	18:	21:	21:	21:	-	-	6.2:	8.4:	1.1:	1.7:	6.1:	-
Portuguese Guinea 9/.....	4/	-	-	-	-	-	-	28.0:	40.1:	-	42.8:	-	-
Southern Rhodesia.....	4/	6:	7:	13:	8:	8:	-	1.6:	2.6:	4.4:	2.5:	2.4:	-
Union of South Africa 13/.....	4/	56:	-	90:	139:	328:	-	12.0:	4.8:	11.3:	31.2:	84.0:	75.8
Total 5/.....	4/	6,120:	6,450:	6,450:	7,100:	7,400:	7,500:	1,692.0:	1,576.5:	1,695.5:	1,981.0:	2,100.0:	2,000.0
OCEANIA													
Australia.....	4/	14:	19:	25:	39:	35:	25:4/	6.1:	11.5:	14.9:	25.5:	17.8:	14.7
Total 5/.....	4/	15:	20:	30:	45:	40:	30:	6.5:	12.0:	15.5:	27.0:	18.5:	15.5
World total.....	4/	21,600:	25,100:	26,100:	27,100:	26,500:	27,400:	9,550.0:	9,623.0:	10,580.0:	10,767.0:	11,000.0:	11,460.0

1/ Peanuts in the shell. Southern Hemisphere peanut crops, which are harvested from April to June, are combined with those of the Northern Hemisphere harvested from September through December of the same year. 2/ Figures refer to harvested areas as far as possible. 3/ Preliminary. 4/ Average of less than 5 years. 5/ Includes estimates for the above countries for which data are not available and for minor producing countries. 6/ Beginning with 1945, figures include Southern Dobrudja. 7/ One year only. 8/ Partly estimated prior to 1946. 9/ Export figures. 10/ Java and Madura. 11/ Planted acreage. 12/ Exports from Kenya and Uganda. 13/ Production on European farms only.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research, and other information.

It is believed that a surplus of about 450,000 tons will be available for export in the form of seed or oil. On July 5, 1949, the Government of India announced export quotas of edible oils for shipment to Pakistan for the period July 1949 through June 1950. These quotas included about 17,000 tons of peanut oil and 17,000 tons of vanaspati (practically all of which is produced from peanut oil). Apart from Pakistan, the Government does not appear to have established any quota for other destinations.

This year's peanut production in Japan is forecast at 9,900 tons compared with 8,800 in 1948 and 14,600 prewar.

Indonesian output is expected to reach approximately 300,000 tons, the largest crop since before the war. To stimulate exports of peanuts and peanut oil, exporters have been given permission to retain 15 percent of the foreign exchange proceeds from peanut and peanut oil shipments to finance imports of commodities which are approved by the Import Bureau. The ruling applies to all ports of Indonesia and took effect July 1, 1949.

Unofficial estimates place Argentina's peanut crop at 130,000 tons, approximately the same as last year's and almost 50 percent higher than prewar. Sowings for the 1949 crop, about 469,000 acres, were believed the largest on record, but late plantings, early drought, and rains at harvest time resulted in very low yields.

Brazil's 1949 peanut output is unofficially estimated at 115,700 tons, a decrease of 25 percent from the record crop of 154,000 tons (revised) in 1948.

The over-all supply situation of edible oils in Brazil is such, however, as to warrant the expectation that 11,000 to 16,500 tons of peanut oil, or the equivalent in peanuts, may be available for export in late 1949 or early 1950. January-May 1949 exports from Brazil included 6,850 tons of peanuts and 9,200 tons of peanut oil.

Uruguay harvested a record peanut crop in 1949. The official estimate is 11,500 tons from 49,000 acres compared with 10,600 in 1948 and only 1,180 prewar. The great demand for edible vegetable oils for local consumption has stimulated increased production of peanuts and sunflower seed. Early in August an executive decree announced an export quota of 8,800 tons of peanut and/or sunflower seed oil.

Tanganyika's 1949 production is estimated at 10,800 tons against 9,000 a year ago. The Overseas Food Corporation has recently announced a change over from peanuts to sunflower seed on 64,000 acres in the Kongwa area, since the latter was found to be more suited to soil and climatic conditions.

The Gambian peanut crop may reach 80,000 tons compared with about 69,000 in 1948. The exportable surplus during the 1949-50 season is expected to exceed the 62,000-ton average of the last ten years. The Gambia Oilseed Marketing Board has set the price for 1949-50 peanuts (unshelled) at £35-15-0 per long ton f.o.b. (\$89.40 per short ton).

Annual production in Sierra Leone amounts to about 2,000 tons, all of which go to the United Kingdom. The price paid the producer is £21-1-6 per long ton (\$52.70).

From the extremely meager information available, French West Africa's peanut harvest is forecast at 790,000 tons, showing a slight increase over the 780,000 tons estimated for 1948.

Mozambique's output, estimated at 15,000 tons, was greatly reduced by unusually heavy spring rains.

Nigeria's peanut crop is expected to drop from 600,000 tons last year to around 550,000 tons this season. Rains have been unusually light and late in the Northern Provinces, the heart of the peanut growing area. The low rainfall has been particularly discouraging this season because, as a result of a £2 (\$5.00) increase in price (the Oilseed Marketing Board now pays £21-4-0 a long ton or about \$53.00 a short ton), there was a new interest in planting peanuts, and it is estimated that preliminary planting covered a greater area than the estimated normal of 2,675,000 acres.

As a result of one of the most serious droughts of recent years, the peanut harvest in the Union of South Africa dropped from 84,000 tons in 1947-48 to an estimated 75,800 in 1948-49. This is the first time since 1944-45 that the output has not at least doubled that of the previous season.

Australia's 1949 harvest is estimated at 14,700 tons from 25,000 acres compared with 17,800 tons from 35,000 acres in 1948.

This is one of a series of regularly scheduled reports on world agricultural production approved by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report the committee was composed of C.M. Purves, Acting Chairman, Paul E. Quintus, Regina H. Boyle, Helen Francis, Tilmer O. Engebretson, Mary E. Long, and Constance H. Farnworth.

WORLD COFFEE PRODUCTION LOWER

World production of coffee for export in 1949-50 will be about 9 percent lower than in 1948-49 and 20 percent below the 1935-39 average, according to early-season forecasts. Exportable production from 1949-50 crops is expected to total about 28.7 million bags (of 132 pounds each) compared with 31.4 million bags for 1948-49 and the 1935-39 annual average of 35.9 million bags. Substantial decreases are forecast for Latin America and Asia, whereas increases are expected in Africa and Oceania.

Latin America. Brazil's 1949 harvest (April to September) supplied an estimated 14,400,000 bags for export compared with 17,000,000 bags the previous year and an annual average of 22,600,000 bags in the prewar period (1935-39). In addition to decreased production, the average quality of the 1949 harvest was somewhat below average. Most of the decrease from 1948 occurred in the State of Sao Paulo which produces better average quality coffee than most other states in Brazil. The 1949 exportable surplus in Sao Paulo of 7,300,000 bags was 4,000,000 below 1948. The decrease in supplies in 1949 resulted from adverse weather conditions and a normal decrease which usually follows a large crop. Exportable production in other Brazilian States increased from 5,700,000 bags in 1948 to 7,100,000 bags in 1949. Broca damage was less severe throughout Brazil in 1949 than in 1948, principally as a result of increased use of insecticides.

Colombia expects a normal crop of about 5,600,000 bags for export in 1949-50, the same size as the 1948-49 harvest. Weather conditions in Colombia have been favorable, and the quality of the new crop is expected to be good. El Salvador's 1948-49 harvest reached a record high of 1,190,000 bags for export. The 1949-50 crop is expected to fall to 1,035,000 bags chiefly because of lack of rainfall during the second quarter of 1949.

Floods in Guatemala during October are expected to reduce the 1949-50 exportable output of coffee in that country. The crop is forecast at 750,000 bags as compared with 910,000 in 1948-49. Venezuela has forecast a total coffee harvest in 1949-50 about as large as the 1948-49 harvest. Exceptionally favorable weather in the highland areas will increase the outturn of highland coffee, whereas a severe drought which has afflicted the lower coffee-growing regions will decrease the production of lowland coffee. Since the highland coffee is preferred by foreign buyers and is generally produced for export rather than for local consumption, a larger percentage of the 1949-50 crop will be shipped abroad. The 1949-50 crop is expected to provide 600,000 bags for export compared with 550,000 bags from the 1948-49 harvest.

An export crop of 575,000 bags of coffee is forecast for Mexico in 1949-50 compared with 675,000 bags in 1948-49. Inadequate rainfall and hot, dry weather at the time of flowering are chiefly responsible for the expected decline in production. High-grown coffee suffered the worst damage. Floods during October did some damage to coffee in the State of Chiapas. Exportable production of coffee in Ecuador dropped from a record high of 310,000 bags harvested in 1948 to 190,000 bags in 1949 because of a prolonged drought during the flowering season and heavy rains during the picking season.

Costa Rica expects an increase in coffee production from 270,000 bags for export in 1948-49 to 380,000 bags in 1949-50. A severe storm occurred in October, but the coffee crop was reported to have suffered little damage. Another bumper coffee crop is expected in Haiti. The 1948-49 export crop amounted to 485,000 bags, and the 1949-50 crop was expected to be about as large. However, fear has been expressed that floods in October may have done much damage to the crop. Nicaragua has forecast a bumper harvest of 265,000 bags for export in 1949-50 compared with the very poor output of only 110,000 bags in 1948-49.

COFFEE: Estimated total and exportable production in specified countries,
average 1935-36 to 1939-40, annual 1947-48 to 1949-50 $\frac{1}{2}$

Continent and country	Average 1935-36 to 1939-40			1947-48			1948-49 2/			Forecast 1949-50 2/		
	Total	Exportable	1,000	Total	Exportable	1,000	Total	Exportable	1,000	Total	Exportable	1,000
	bags	bags	bags	bags	bags	bags	bags	bags	bags	bags	bags	bags
Latin America												
Brazil	26,938	22,658	18,887	13,572	22,348	17,033	19,729	14,414	5,600	6,140	380	3/
Colombia	4,452	4,202	5,780	5,240	6,140	5,600	6,140	5,600	6,140	380	3/	
Costa Rica	390	330	460	410	300	270	450	380	450	380	3/	
Cuba	425	58	556	3/	465	3/	605	215	3/	605	3/	
Dominican Republic	347	222	300	190	345	235	325	185	3/	325	3/	
Ecuador	268	223	235	200	345	310	190	190	3/	190	3/	
El Salvador	1,091	1,011	1,070	980	1,280	1,035	1,125	1,035	1,125	1,035	1,125	
Guatemala	1,002	922	1,057	827	1,140	910	980	750	980	750	980	
Haiti	538	438	570	375	680	485	675	480	675	480	675	
Honduras	57	27	100	60	105	65	100	60	100	60	100	
Mexico	959	609	886	511	1,050	675	950	575	950	575	950	
Nicaragua	280	253	287	242	185	110	310	265	310	265	310	
Peru	60	47	85	0	85	0	95	0	95	0	95	
Venezuela	940	740	780	530	800	550	800	600	800	600	800	
Others 4/	306	180	360	40	350	45	355	325	355	325	355	
Total	38,073	31,900	31,413	23,177	35,588	27,478	32,839	24,589				
Africa												
Angola	300	273	775	725	620	570	735	685	570	735	685	
Belgian Congo	320	300	650	625	535	510	525	500	510	525	500	
Ethiopia	345	283	420	335	500	415	510	425	510	425	510	
Ivory Coast	250	207	690	640	585	585	650	600	585	650	600	
Kenya	297	293	236	230	110	104	150	144	110	104	144	
Madagascar	537	437	335	285	445	395	500	450	395	500	450	
Tanganyika	265	260	238	232	211	205	258	252	211	205	252	
Uganda	225	222	550	544	518	512	490	484	512	490	484	
Others 5/	65	60	280	260	260	240	270	250	260	240	250	
Total	2,602	2,315	4,174	3,876	3,534	3,536	4,088	3,790				
Asia												
India	278	155	268	0	365	65	325	25	365	65	325	
Indonesia	1,961	1,356	335	205	400	135	440	100	400	135	440	
Yemen	130	76	150	100	125	75	140	90	125	75	140	
Others 6/	75	60	85	40	95	45	90	40	95	45	90	
Total	2,444	1,647	838	345	985	320	995	255				
Oceania 7/												
	101	53	80	30	85	30	90	40	85	30	90	
World total	43,220	35,915	36,505	27,428	40,492	31,364	39,002	28,674				

1/ Production is given by crop years in the various countries. Generally, the main coffee harvesting period begins about October and continues until February or March of the following year, except in certain Southern Hemisphere countries such as Brazil, Madagascar, and Indonesia where the main harvest begins April to June and is completed in September or October of the same year.

2/ Preliminary. 3/ Exports prohibited. 4/ Includes Guadeloupe, Puerto Rico, Surinam, British West Indies, and Panama Republic.

5/ Includes French Cameroons, French Equatorial Africa, Sao Tome and Principe, British West Africa, and Spanish Africa.

6/ Includes Indo-China, Philippines, and Timor. 7/ Includes Hawaii, New Caledonia, and New Hebrides.

Office of Foreign Agricultural Relations. Compiled or estimated from International Yearbook of Agricultural Statistics, official reports, and reports of United States Foreign Service officers.

Cuba, also, expects a record large crop in 1949-50 of 605,000 bags compared with 465,000 bags in 1948-49. Exports from Cuba are prohibited by decree; however, Cuban growers are expected to urge the Government to authorize exportation of some Cuban mild coffee to the United States at the peak of the harvesting season. The Dominican Republic and Honduras expect slightly smaller coffee crops in 1949-50 than in the previous season.

Africa. Exportable coffee production in Africa is expected to increase from 3,500,000 bags in 1948-49 to 3,800,000 bags in 1949-50. Angola shows the biggest increase, with a 1949-50 forecast of 685,000 bags for export compared with 570,000 bags in 1948-49. Madagascar is next with a forecast of 450,000 bags for export in 1949-50 compared with 395,000 in 1948-49. Despite some predictions of another poor crop, exportable production in Kenya is forecast at 144,000 bags as compared with 104,000 bags in 1948-49. Normal exportable production for the Colony is over 250,000 bags.

Tanganyika has forecast an increase of exportable production from 205,000 bags in 1948-49 to 252,000 bags in 1949-50. Growing conditions have been favorable for high altitude coffee, but drought has adversely affected the coffee at low altitudes.

Coffee production in the Belgian Congo has fallen from the record high level of 625,000 bags for export in 1947-48 to 510,000 bags in 1948-49 and a forecast of 500,000 bags in 1949-50. This is a short term trend, however, because Belgian Congo producers have planted more than 20,000 acres of coffee trees in the past few years, and these soon will be in bearing. In Uganda, a good crop is expected in the higher altitudes, but the crop at the lower altitudes has suffered extensively from the drought. The 1949-50 exportable production is forecast at 484,000 bags compared with 512,000 bags in 1948-49. Ethiopia and the Ivory Coast are expecting slightly larger crops in 1949-50.

Asia. A decrease in exportable production of coffee from 320,000 bags in 1948-49 to 255,000 bags in 1949-50 is indicated for Asia. Unfavorable weather delayed picking of the 1949-50 coffee crop in India. The Robusta coffee crop was reported to be a bumper one, but indications are that the Arabica crop is poor. The total 1949-50 coffee crop is forecast at 325,000 bags, which should supply about 25,000 bags for export compared with 65,000 bags in 1948-49. Indonesia is expected to produce more coffee in 1949-50 than in 1948-49, but will probably export less. Indonesia could consume all the coffee it will grow, but will export some coffee because of trade commitments. However, the amount exported from the 1949-50 crop will probably not exceed 100,000 bags compared with 135,000 bags officially reported for 1948-49 and an annual prewar average exportable production of 1,356,000 bags. Yemen's exportable production for 1949-50 is expected to be slightly higher than for the preceding year.

Oceania. Little information is available on the coffee crop prospects for Oceania. However, much interest has been expressed in the past few years in increasing coffee production in Hawaii, New Caledonia, and New Hebrides. Exportable productions in these Islands is forecast at 40,000

bags compared with 30,000 bags in 1948-49 and an annual prewar average of 53,000 bags.

This is one of the series of regularly scheduled reports on world agricultural prospects approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of C.M. Purves, Chairman, J. Barnard Gibbs, T.D. Spivey, Dwight R. Bishop, T.O. Engebretson, C.S. Stephanides, and Mary Ellen Long.

WORLD'S 1949 HOPS CROP CONTINUES UNDER PREWAR LEVEL 1/

The 1949 production of hops in reporting countries which before the war accounted for more than 92 percent of the world's total is tentatively estimated at 110,648,000 pounds, according to the United States Department of Agriculture's Office of Foreign Agricultural Relations. This compares with 113,356,000 pounds produced in those areas in 1948 and with their prewar (1934-1938) average of 120,881,000 pounds.

Hops production was greatly reduced during the war in European surplus producing countries as well as in most of the European importing countries. In some areas, gardens were completely destroyed by military operations. In others, much of the land previously devoted to hops had to be used for food crops. Many gardens deteriorated as a result of disease and neglect. Moreover, recovery in production has been retarded by shortages of fertilizer, wire, insecticides and other materials needed by producers, shortages of skilled labor, and the heavy investment required in restoring gardens.

The only countries where hops production was expanded during the war were the United States, the United Kingdom and Canada. Except for a few years in the late 1930's, the United States has always been a large net exporter of hops. During and since the end of the war, United States production has been geared to meeting a demand in many countries which previously had been met largely by hops from Central Europe. With the virtual disappearance of that area as a source of supply, all countries outside of Europe turned to the United States for the bulk of their import needs.

1/ A more extensive statement (Foreign Agriculture Circular FH 2-49) may be obtained from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D.C.

World Production of Hops, Average 1934-38,
Annual 1945 to 1949

Country	Average: 1934-38	1945	1946	1947	1948	1949
	1/					
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
United Kingdom.....	28,023	31,685	31,662	32,444	30,614	27,978
Czechoslovakia.....	2/21,462	8,204	11,658	10,320	10,720	11,023
Germany.....	20,033	-	-	-	-	-
Bizone Area only.....	-	3/	10,362	8,951	11,750	12,200
France.....	4,936	2,940	2,584	2,072	3,108	3,549
Belgium.....	2,659	1,187	1,619	1,900	1,438	1,438
Other Europe						
Austria.....	4/ 108	3/	3/	3/	19	3
Hungary.....	146	3/	3/	3/	3/	3/
Poland.....	3,907.5/	1,213	3/	3/	3/	606
Rumania.....	42.5/	20	3/	3/	3/	3/
Yugoslavia.....	3,977.6/	668	3/	3/	3/	2,205
U.S.S.R.	2,205	3/	3/	3/	3/	3/
United States.....	38,977	56,772	53,171	50,098	49,819	49,511
Canada.....	1,612	1,728	2,502	2,491	2,130	2,209
Australia.....	2,304	2,220	1,822	2,323	2,498	1,721
New Zealand.....	875	900	544	753	987	767
Union of South Africa...	3/	138	214	235	292	252
Total, stated areas	131,266	107,675	116,138	111,587	113,375	113,462
Total, excluding						
Other Europe.....	120,881	105,774	116,138	111,587	113,356	110,648

- 1/ International Yearbook of Agricultural Statistics 1941-42 to 1945-46, Rome.
Totals calculated for territories included in 1937 boundaries.
- 2/ Average for 4 years.
- 3/ Not available.
- 4/ Average for 3 years.
- 5/ Yearbook of Food and Agriculture Statistics, 1947. Present boundaries.
- 6/ Estimate for Slovenia only.

With the slow rate of recovery in hops production in Continental Europe since the end of the war, the export demand for United States hops has continued at a high level. During the season (1948-49) just ended, this country's exports of hops amounted to 12,376,000 pounds compared with 11,081,000 pounds in 1947-48 and with the prewar (1934-35 to 1938-39) average of 5,128,000 pounds. The 1948-49 exports represented 24.8 percent of the 1948-crop compared with 22.1 percent the year before. For the 5-year period immediately preceding the war, our average annual exports represented 13.2 percent of production.

United States Exports of Hops for Stated Periods
(Years beginning September 1 and ending August 31)

Destination	Average : : 1940-41 to : : 1944-45 :	1944-45 :	1945-46 :	1946-47 :	1947-48 :	1948-49 :
	<u>Pounds</u> :	<u>Pounds</u> :	<u>Pounds</u> :	<u>Pounds</u> :	<u>Pounds</u> :	<u>Pounds</u> :
North America . . .	3,400,310:	4,043,596:	5,667,103:	4,691,815:	3,816,817:	4,755,173:
Central America . . .	150,355:	200,738:	205,561:	211,746:	121,501:	196,666:
Caribbean	240,494:	342,137:	410,698:	405,920:	505,306:	486,996:
South America	2,651,678:	2,452,760:	4,040,575:	4,358,774:	5,174,313:	4,764,258:
Europe	631,752:	740,902:	1,934,885:	753,472:	440,071:	925,498:
Africa	902,429:	822,126:	1,131,210:	580,356:	126,946:	215,566:
Asia	511,192:	77,857:	383,465:	287,766:	234,885:	234,299:
Oceania	143,615:	5,834:	516,531:	970,720:	661,300:	797,346:
Total	8,631,825:	8,635,950:	14,290,028:	12,260,569:	11,081,139:	12,375,802:

Compiled from official records of the Bureau of the Census, United States Department of Commerce.

Increasing foreign exchange problems, especially the dollar position, are now raising questions in many of the hops importing countries about sources of supply and levels of consumption. The demand for United States hops in foreign markets, however, is expected to continue at a relatively high level during the 1949-50 season. With respect to other sources of supply, the 1949 crops were larger than those of 1948 in such surplus producing countries as Czechoslovakia, Germany and possibly in Yugoslavia and Poland, but lower in the United Kingdom. However, production in all of the Central European surplus producing areas continues far below the prewar average, and there is little likelihood of export availabilities in any of those countries even approaching the prewar volume in the near future. In that same connection, exporters of hops in the United Kingdom report increasing difficulties in competing with the United States product in export markets because of the higher prices quoted for British hops.

During the past season (1938-49), United States imports of hops amounted to only 3,900,000 pounds valued at \$4,149,000 compared with 5,581,000 pounds valued at \$5,717,000 during 1947-48. The reduction is probably due to the relatively high prices quoted for the European product and to the continued low level of production in European surplus producing countries. During the five years immediately preceding the war (1934-35 to 1938-39), imports averaged 8,012,000 pounds annually.

United States Imports of Hops by Countries of Origin for Stated Periods
(Years beginning September 1 and ending August 31)

Origin	Average : 1934-35 to : : 1938-39 :	1945-46	1946-47	1947-48	1948-49
	Pounds	Pounds	Pounds	Pounds	Pounds
Czechoslovakia	3,813,000:	1,608,000:	3,157,000:	2,408,000:	1,509,000
Germany	1,538,000:	1,892,000:	756,000:	2,723,000:	1,937,000
Yugoslavia	1,972,000:	331,000:	189,000:	112,000:	134,000
Poland and Danzig	329,000:	- :	- :	- :	-
United Kingdom	33,000:	- :	- :	7,000:	5,000
Belgium	128,000:	- :	- :	- :	4,000
U.S.S.R.	3,000:	- :	- :	330,000:	-
Netherlands	79,000:	3,000:	- :	1,000:	-
France	84,000:	- :	- :	- :	-
Canada	14,000:	25,000:	24,000:	1/ :	73,000
All others	19,000:	- :	- :	- :	2/ 238,000
Total	8,012,000:	3,859,000:	4,126,000:	5,581,000:	3,900,000

1/ Less than 500 pounds. 2/ Mainly Italy, 232,539 pounds.

Compiled from official records of the Bureau of the Census, United States Department of Commerce.

COMMODITY DEVELOPMENTS

TOBACCO

FRANCE'S 1949 TOBACCO CROP
LOWER; IMPORTS HIGHER

The latest unofficial estimate of France's 1949 tobacco crop is 25 percent below an early season forecast, according to the American Embassy in Paris. Imports of leaf during the first 6 months of 1949 were more than treble imports during the same period of 1948.

France's 1949 production of leaf tobacco is now unofficially estimated at about 86 million pounds, farm sales weight basis. This compares with an earlier forecast of 1949 production of about 115 million pounds, the 1948 harvest of 106.6 million, and the record 1947 crop of 115.1 million.

The area planted to tobacco in 1949 is placed at 74,921 acres, compared with 63,806 acres in 1948 and 71,660 acres in 1947. The estimated 1949 yield of 1,150 pounds per acre is 31 percent below the 1948 yield of 1,666 pounds per acre and 28 percent below the 1947 yield of 1,606 pounds per acre. The decline in yield in 1949 is attributed primarily to unusually dry weather which prevailed during the growing season in most districts. It is reported that the yield varied widely from one district to another.

Imports of leaf tobacco during the 6 months ending June 30, 1949, totaled 42.5 million pounds. This compares with 12.4 million pounds during the same period of 1948 and 36.3 million pounds during the January-June 1947 period. The United States supplied 6.4 million pounds or 15 percent of the total in the January-June 1949 period, compared with less than 1 percent in 1948 and 17 percent during the first 6 months of 1947. Other important sources of leaf during 1949 include Algeria, Madagascar, Turkey, Yugoslavia, Brazil and Colombia.

CHILE'S TOBACCO PRODUCTION RISES

Chile's 1948-49 tobacco harvest is estimated at 37 percent above the 1947-48 crop, the American Embassy in Santiago reports. The area to be planted to tobacco in 1949-50 is forecast slightly above 1948-49.

A final estimate of the country's 1948-49 production of leaf tobacco places the crop at 17.2 million pounds from 9,560 acres, or the same as the preliminary estimate released last March when the crop was being harvested. This compares with 12.5 million pounds from 7,677 acres in 1947-48 and 11.3 million pounds from 5,384 acres in 1946-47. The 1948-49 crop consisted of 13 million pounds of Paraguayan type leaf, 3.8 million pounds of Havana type leaf, 355,000 pounds of flue-cured and 29,000 pounds of Burley.

The area to be planted to tobacco in 1949-50 is forecast at 9,710 acres, or about 2 percent above the 1948-49 harvested acreage. An increase in the planted acreage of 40 percent is forecast for Havana type leaf, 50 percent for flue-cured and 58 percent for Burley. A decrease of 10 percent is forecast for Paraguayan type tobacco, but this type is expected to still represent about 68 percent of the total acreage planted to tobacco.

Chile is practically self-sufficient in tobacco production. Only small quantities of leaf are imported from Cuba and the United States for blending and other special purposes. Leaf imports during the first 8 months of 1949 totaled 423,000 pounds, compared with 608,000 pounds during the same period of 1948 and 542,000 pounds during the January-August 1947 period. Minor quantities of manufactured tobacco products are also imported, but in the first 8 months of 1949 these totaled only 13,880 pounds.

DOMINICAN REPUBLIC'S TOBACCO
PRODUCTION AND EXPORTS HIGHER

The Dominican Republic's 1948-49 tobacco harvest was 30 percent above the 1947-48 crop, according to the American Embassy in Ciudad Trujillo. Leaf exports during the first 9 months of 1949 were 60 percent above the same period of 1948.

The country's 1948-49 production of leaf tobacco is now estimated by the Dominican Department of Agriculture at 50 million pounds, dried weight basis, from 54,100 acres. This compares with 38.6 million pounds from 38,460 acres in 1947-48 and 32.5 million pounds from 37,000 acres in 1946-47. The increase in production in 1948-49 was entirely due to the larger planted acreage, as the 1948-49 yield of 925 pounds per acre was 8 percent below the 1947-48 yield of 1,003 pounds per acre and 25 percent below the 1946-47 yield of 1,226 pounds per acre.

The Dominican Republic's exports of leaf tobacco during the 9 months ending September 30, 1949, totaled 30.6 million pounds, compared with 19.1 million pounds during the same period of 1948 and about 23 million pounds during the January-September 1947 period. A breakdown of 1949 exports by countries of destination is unavailable, but in 1948 the principal outlets for Dominican leaf, in order of their importance, were Spain, the Netherlands, Belgium, Morocco, Canary Islands, France, and Gibraltar.

GRAINS, GRAIN PRODUCTS AND FEEDS

WHEAT AGREEMENT RATIFIED
BY 32 COUNTRIES

Guatemala formally accepted the International Wheat Agreement on November 14 bringing to 32 the number of actively participating countries. The Government of Haiti recently acceded to the Agreement with guaranteed purchases of 1,028,824 bushels of wheat and wheat flour, but as of November 16 had not deposited its instrument of acceptance.

There remain only 4 signatory importing countries--China, Colombia, Liberia and the Philippines--and one exporter--Uruguay--which have not yet ratified the Agreement. The time limit for formal acceptance of the Agreement was extended to February 28, 1950 by the International Wheat Council.

CUBA IMPORTS MORE
RICE THAN AVERAGE

Cuban rice imports have been above average so far during the current marketing season, according to data compiled from ships' manifests. Arrivals from July through November 9 approximated 215 million pounds compared with 86 million pounds during the July-October period of 1948 and the average of 125 million pounds during that period of the 5

years, 1944-48. Imports from January through November 9, 1949, approximated 450 million pounds, nearly all from the United States.

The decree changing the Cuban import quota on rice to a July 1-June 30 basis, which the Cabinet reportedly approved November 3, has not yet been promulgated. Unconfirmed reports in the second week of November were circulating that the quota for the 1949-50 year may be set at or near the minimum allowed by the General Agreement in Tariffs and Trade (330 million pounds). These two factors reportedly were partially responsible for comparatively large purchases during the first week of November. Importers desire adequate stocks on hand should establishment of a small quota impair the ability to purchase for future delivery. Arrivals during the first week of November totaled 12 million pounds.

EGYPTIAN RICE PRICES ANNOUNCED

The prices, specifications, and terms of sale for Egypt's 1949 rice crop were announced by the Ministry of Supply, and published on November 1. They are as follows:

EGYPT: Rice prices, per 100 pounds,
f.o.b. Alexandria, 1949-50

Grade	Price	Specifications				
		Foreign matter	Yellow seed	Broken grain	Barley rice	
	Dollars	Percent	Percent	Percent	Percent	Percent
Cargo.....	5.93	0.25	0.25	3	3	
Mansouh.....	6.22	1	1	2	0.25	
Natural.....	6.53	.5	.5	6	-	
Natural Superior.....	6.60	.25	.25	3	-	
Polished.....	6.66	.5	.5	6	-	

The Egyptian Gazette, November 1, 1949.

Payments are to be made in United States or Canadian dollars, or Swiss or Belgian francs. The Natural rice is to be packed in new sacks, and the Cargo and Mansouh are to be packed in sacks of good condition. These prices will be increased when exporters ship the Natural, Natural Superior, and Polished varieties in double sacks, that is, used inner sacks and new outer sacks.

The rice may also be bartered for the import of certain specified commodities. Offers for barter should be accompanied by a deposit or letter of guarantee from a recognized bank, amounting to 2 percent of the total value. They should also contain full details of the goods proposed to import, such as price, ports of shipment and date of delivery.

The Ministry will provide the necessary export permits for all quantities for which the necessary irrevocable credits in the hard currencies quoted above will have been opened with an accredited bank in Egypt, and after acceptance by the exporter of the conditions of sale. Only offers from registered rice exporters whose names appear on the list of the Ministry of Commerce and Industry will be considered.

JAPAN HARVESTS LARGE RICE CROP

The 1949 rice production of Japan is officially estimated at 599,105,000 bushels of rough rice, 2 percent larger than the harvest of 586,004,000 bushels in the year before, and slightly above the prewar average, according to SCAP's Public Information Office, Tokyo. The harvest was the largest since 1942, when 609,281,000 bushels were produced.

These data allow for "rice blast" and other damage occurring prior to October 10. Production was expected to be substantially larger earlier in the season but damage from typhoon and late-season damage from "rice blast" and other pests reduced the crop drastically in some areas.

JAPAN: Rice production and imports,
average 1935-39, annual 1946-49

Year	Production		Net imports 1/ 2/	Production minus imports 2/
	Rough	In terms		
		of		
		milled		
	1,000	Million	Million	Million
	<u>bushels</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
Average:				
1935-39.....	595,845	18,769	3,890	22,659
1946.....	561,082	17,674	6	17,668
1947.....	553,405	17,432	124	17,308
1948.....	586,004	18,459	-	-
1949.....	599,105	18,872	-	-

1/ Calendar year following harvest. 2/ In terms of milled rice.

Compiled from official sources.

Japan's prewar average imports and shipments from colonies approximated 3.900 million pounds annually in terms of milled rice. Since the war, however, imports have been insignificant as compared with prewar because of the decrease in the output of Asia's surplus-producing countries. Rice imports of about 125 million pounds in 1948 were obtained primarily from Siam.

The total rice utilization of Japan in 1948, therefore, was approximately 75 percent of the prewar average. At the same time, a substantial gain occurred in population.

FATS AND OILS

PHILIPPINE COPRA EXPORTS
APPROACH 1948 LEVEL

Philippine copra exports during October amounted to 55,445 long tons, 28 tons less than the September shipments. January-October exports totaled 457,074 tons compared with 517,126 tons during the comparable period of 1948.

PHILIPPINE REPUBLIC: Copra exports, October 1949 with comparisons
(Long tons)

Country 1/	Copra distribution				
	Average 1935-39	1948 2/	Jan-Oct 1949 2/	October	
United States (total)...	206,801	364,102	300,632	19,409	44,083
Atlantic Coast....	-	61,618	31,430	10,950	4,563
Gulf Coast.....	-	69,320	37,201	4,000	3,907
Pacific Coast.....	-	233,164	232,001	4,459	35,613
Canada.....	-	17,049	12,900	-	950
Mexico.....	7,260	-	-	-	-
Panama Canal Zone.....	-	707	775	300	-
Panama, Republic of....	-	1,357	209	-	-
Colombia.....	-	6,995	-	-	-
Venezuela.....	-	3,868	1,133	-	-
Austria.....	-	6,000	-	-	-
Belgium.....	10	1,000	5,650	-	3,300
Denmark.....	6,025	26,536	16,025	1,700	-
France.....	24,589	65,912	23,757	1,000	-
Bizonal Germany.....	7,309	17,250	27,730	-	570
Italy.....	4,079	21,900	11,610	1,000	1,400
Netherlands.....	28,415	8,949	4,850	3,049	-
Norway.....	91	9,276	8,000	3,979	-
Poland.....	-	31,749	1,500	6,900	-
Sweden.....	4,183	4,748	7,600	-	-
Switzerland.....	-	1,000	-	500	-
Japan.....	1,047	24,339	6,075	-	-
Syria.....	-	1,443	1,300	-	600
Egypt.....	1,271	-	-	-	-
Union of South Africa..	-	-	2,198	-	202
Others.....	8,758	11,450	3/25,070	-	4,340
Total.....	299,838	625,630	457,074	37,837	55,445

1/ Declared destination. 2/ Preliminary. 3/ 20,190 to Trieste; 2,000 to Algeria; 2,474 to Palestine; and 406 to others.

American Embassy, Manila.

PHILIPPINE REPUBLIC: Coconut oil exports,
October 1949 with comparisons
(Long tons)

Country of destination	Average 1935-39	1948 1/	Jan.-Oct. 1949 1/	October	
				1948 1/	1949 1/
United States	155,353	41,338	42,497	6,633	5,015
Canada	1,885	-	-	-	-
Norway	-	-	500	-	-
Bizonal Germany	660	-	3,830	-	-
Italy	-	396	4,249	-	1,666
Netherlands	-	-	915	-	-
China	392	-	-	-	-
Hong Kong	583	-	-	-	-
Poland	-	-	260	-	-
Siam	54	-	-	-	-
Trieste	-	125	-	-	-
Other countries	2,815	126	974	-	384
Total	161,747	41,985	53,225	8,633	7,065

1/ Preliminary.

American Embassy, Manila

October coconut oil exports came to 7,065 tons against 5,631 in September. Shipments of 53,225 tons during the first 10 months of 1949 were 60 percent higher than the comparable figure for 1948 and exceeded the total quantity exported in 1948 by 27 percent.

At the end of October total exports of copra and coconut oil, in terms of copra, were only 5 percent less than a year ago. About two-thirds of the 10-month copra shipments and four-fifths of the oil were sent to the United States.

Copra prices, quoted at \$180 per ton c.i.f. Pacific Coast, were expected to go to \$185 as of November 15. The increase from \$162 in mid-October is attributed to recent typhoon damage, the extent of which has not yet been determined. Local buying prices are reported at 35 pesos per 100 kilograms (\$177.30 per long ton) in Manila and 32 to 34 pesos (\$162.57 to \$172.73) in producing regions.

INDONESIAN COPRA EXPORTS
DROP TO LOW OF YEAR

Indonesian copra exports during October of 15,961 long tons represented the smallest monthly shipment of the year. The January-October total of 257,008 tons, however, exceeded the comparable figure for 1948 by 30 percent and the exports for the year by 8 percent.

INDONESIA: Copra exports, -October 1949 with comparisons
(Long tons)

Country	Copra distribution					
	Average	1948 1/	Jan.-Oct.	October		
	1935-39		1949 1/	1948 1/	1949 1/	1949 1/
Canada.....	-	8,320:	3,650 :	- :	- :	-
Mexico.....	12,614 :	- :	- :	- :	- :	-
United States.....	3,909 :	5,734:	13,100 :	800 :	- :	-
Belgium.....	8,053 :	8,018:	4,000 :	2,000 :	- :	-
Czechoslovakia.....	4,896 :	2,000:	2,400 :	- :	- :	-
Denmark.....	72,375 :	4,120:	5,000 :	- :	5,000 :	-
France.....	12,748 :	5,937:	- :	1,937 :	- :	-
Bizional Germany.....	64,674 :	19,578:	12,842 :	- :	- :	-
Italy.....	23,103 :	- :	- :	- :	- :	-
Netherlands.....	133,841 :	159,440:	150,584 :	9,012 :	- :	-
Norway.....	31,810 :	3,000:	- :	- :	- :	-
Poland.....	1,422 :	2,500:	1,500 :	- :	1,000 :	-
Sweden.....	6,886 :	11,670:	10,500 :	- :	- :	-
Switzerland.....	17 :	6,500:	1,500 :	1,000 :	500 :	-
United Kingdom.....	412 :	- :	29,922 :	- :	6,500 :	-
Japan.....	6,180 :	- :	7,000 :	- :	- :	-
Singapore.....	107,285 :	- :	12,510 :	- :	2,961 :	-
Union of South Africa:	- :	1,600:	2,500 :	- :	- :	-
Others.....	17,160 :	- :	- :	- :	- :	-
Total.....	507,385 :2/	238,417:3/	257,008 :2/	14,749:	15,961	

1/ Preliminary.

2/ Does not include unrecorded shipments to Singapore.

3/ As of June, total includes shipment to Singapore.

Copra Board, Batavia.

Domestic deliveries to oil factories in October amounted to 11,890 tons. Stocks at the end of the month totaled 34,315 tons, 27,590 in East Indonesia, 3,730 in West Borneo, and 2,995 in Java.

November and December exports are forecast at about 20,700 and 26,600 tons, respectively. Prices remained unchanged.

CHILE CONTINUES TO INCREASE OILSEED ACREAGE

Chilean oilseed acreage for 1949-50 crops is expected to be about 10 percent larger than in 1948-49. The increase probably will be in sunflower seed since the trend in plantings has been steadily upward during the last decade. Flaxseed acreage may be about the same, but a decline in hempseed is foreseen.

Sunflower seed production of 55,500 short tons in 1949 is Chile's largest and exceeds that of the previous year by more than 50 percent. The rapid expansion in this crop is in response to the Government's policy of establishing a satisfactory guaranteed price to growers and an assured market. If next year's (harvested March 1950) anticipated increase materializes, Chile should become almost self-sufficient in edible oils during 1950.

Hempseed production varies from year to year depending upon the demand for fiber since the same acreage is utilized for both fiber and seed. The demand for Chilean hemp fiber is declining. As a result the 1948-49 seed outturn was 4,757 tons from 11,426 acres compared with 5,049 tons and 12,429 acres in the preceding season. There is still a strong demand for hempseed oil on the domestic markets.

Flaxseed production for 1949 has not been reported but is expected to equal the 241,000 bushels harvested in 1948.

Chile's total vegetable oil output for 1949 is estimated at 26,000 tons, an increase of about 50 percent over last year's production.

COTTON AND OTHER FIBER

U.S. COTTON EXPORTS LAGGING

Exports of 394,000 bales (of 500 pounds gross) of cotton from the United States during August-September 1949 are one-third larger than the 298,000 bales exported during the same two months a year ago, but the monthly average is less than half of that for the 1948-49 season.

The slow movement this year is attributed mainly to a change in regulations pertaining to exports under the ECA program, which permits the participating countries to pick up their current allocations as late as March 31, 1950, instead of on a quarterly basis as was done last year. Of equal importance are the scarcity of dollar exchange and the effect of the currency devaluation which have caused considerable delay on the part of the participating countries in compiling and submitting their import requirements for cotton during 1949-50. Maximum purchases of cotton may be expected in non-dollar areas to permit conservation of reduced ECA allocations this year for purchase of other products and commodities. A shift to imports of American-type cotton from other countries will necessarily be very limited, however, because with few exceptions, both stocks and 1949 crops are low.

The present lag in the export movement is expected to be largely overcome in the near future when import requirements have been submitted by the countries participating in the ECA program and available supplies in other producing countries either have been purchased or more definitely determined as to quantities likely to be available. A total export of about 4.5 million running bales or 4.7 million bales of 500 pounds is expected in 1949-50, compared with 4,748,000 running bales or 4,962,000 bales of 500 pounds last year.

UNITED STATES: Exports of cotton by countries of destination;
averages 1934-38; 1939-43; annual 1947-48; August-September 1948 and 1949

(500 pounds gross)						
C o u n t r y	Year beginning August 1				Aug.-Sept.	
	Average		1947	1948	1948	1949
	1934-38	1939-43				
	1,000	1,000	1,000	1,000	1,000	1,000
	bales	bales	bales	bales	bales	bales
Austria.....	0	1/	3	74	2	0
Belgium-Luxembourg :	147	43	53	152	6	12
Czechoslovakis.....	65	0	22	36	2/	15
Denmark.....	35	5	3	30	2	6
Finland.....	35	11	27	35	4	2/
France.....	589	154	216	676	75	77
Germany.....	579	4	232	504	13	89
Greece.....	2	2	1	12	1	7
Italy.....	430	12	70	652	35	50
Netherlands.....	86	34	35	195	6	30
Norway.....	13	6	3	17	1	2
Poland & Danzig.....	224	1	50	95	12	1
Spain.....	101	117	3	70	2/	1
Sweden.....	93	53	6	2/	0	0
Switzerland.....	2	14	3	38	3	6
United Kingdom.....	1,097	987	272	781	9	29
Yugoslavia.....	10	7	0	42	1	0
Other Europe.....	3/ 85	146	1	4/ 64	1	0
Total Europe.....	3,593	1,596	1,000	3,473	171	325
Canada.....	261	294	138	307	13	22
Chile.....	5/	5	2/	60	6	5
Colombia.....	17	9	1	53	3	6
Cuba.....	7	11	13	8	2/	4
India.....	44	18	21	3	2	0
China.....	55	106	303	282	45	0
Japan.....	1,271	216	466	652	49	24
French Indochina....	5/	14	4	8	0	0
Korea.....	5/	n.a.	59	34	0	0
Australia.....	5	20	11	0	0	0
Other countries.....	43	7	9	6/ 82	9	8
Total.....	5,296	2,296	2,025	4,962	298	394

1/ Included with Germany.

2/ Less than 500 bales.

3/ Includes 39 Portugal, 23 Soviet Union.

4/ Includes 28 Soviet Union, 14 Rumania, 6 Bulgaria, 6 Hungary.

5/ If any, included in other countries.

6/ Includes 29 Hong Kong, 11 Palestine.

COTTON-PRICE QUOTATIONS ON WORLD MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange.

COTTON: Spot prices in certain foreign markets, and the U.S. gulf-port average

Market location, kind, and quality	Date : 1949	Unit of : weight	Unit of : currency	Price in : foreign : currency	Equivalent : U.K. cents : per pound
<u>Alexandria</u>		: Kantar			
Ashmouni, Good.....	11-17	: 99.05 lbs.	: Tallari	: 71.80	: 41.62
Ashmouni, F.G.F.....	"	: "	: "	: 70.55	: 40.90
Karnak, Good.....	"	: "	: "	: 79.00	: 45.79
Karnak, F.G.F.....	"	: "	: "	: 72.50	: 42.03
<u>Bombay</u>		: Candy			
Jarila, Fine.....	"	: 784 lbs.	: Rupee	: 1/ 620.00	: 16.50
Broach Vijay, Fine.....	"	: "	: "	: 1/ 690.00	: 18.37
<u>Karachi</u>		: Maund			
4F Punjab, S.G., Fine.....	11-16	: 82.28 lbs.	: "	: 77.00	: 28.23
289F Sind, S.G., Fine.....	"	: "	: "	: 83.50	: 30.62
289F Punjab, S.G., Fine.....	"	: "	: "	: 87.00	: 31.90
<u>Buenos Aires</u>		: Metric ton			
Type B.....	11-17	: 2204.6 lbs.	: Peso	: 1/4000.00	: 37.55
<u>Lima</u>		: Sp. quintal			
Tanguis, Type 5.....		: 101.4 lbs.	: Sol		
Pima, Type 1.....		: "	: "		
<u>Recife</u>		: Arroba			
Mata, Type 4.....	11-17	: 33.07 lbs.	: Cruzeiro		(not available)
Sertao, Type 5.....	"	: "	: "	: 210.00	: 34.55
<u>Sao Paulo</u>					
Sao Paulo, Type 5.....	"	: "	: "	: 194.00	: 31.92
<u>Torreón</u>		: Sp. quintal			
Middling, 15/16".....	"	: 101.4 lbs.	: Peso	: 208.00	: 23.73
<u>Houston-Galveston-New</u>					
Orleans av. Mid. 15/16".....	"	: Pound	: Cent	: XXXXX	: 29.13

Quotations of foreign markets reported by cable from U.S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

1/ Nominal.

U.K. INCREASES USE
OF U.S. COTTON 1/

Cotton consumption in the United Kingdom continued to rise gradually during the 1948-49 season and it has been estimated officially that it will continue to rise about 5 percent in each of the next 3 years. The most significant development, however, has been the shift back to United States cotton during the past season. Imports of United States cotton increased from 292,335 bales (480 pounds net) in the 1947-48 season to 752,549 bales in 1948-49. However, with the devaluation of the British pound which increased the cost of United States cotton to British spinners and the continuing balance-of-payments difficulties, the outlook for future United Kingdom imports of United States cotton is obscure.

Although the United Kingdom Government may cut imports as much as possible from dollar sources, there probably will be difficulty in reducing imports from the United States greatly as alternate sources of supply are limited.

Cotton consumption in the 1948-49 season was reported at 2 million bales or about 4 percent above the previous season. Consumption in 1949-50 has been estimated at 2,100,000 bales.

During the first quarter of 1949 an average of 15,340,000 mule and 7,570,000 ring spindles were in operation, representing 78 percent of capacity. This was a marked advance from the corresponding period of 1948 when spinning mills were operating at 70.4 percent of capacity. At the end of the first quarter of 1949 there were 114,230 operatives employed 2/ in the spinning mills, compared with 107,890 a year previously, an increase of nearly 6 percent. Although this is the highest level of operation in the postwar period, the elimination of overtime and the conversion to normal working hours during the summer of 1948 partially offset these gains in the labor force. The number of workers still is only three-fourths the prewar level and it is believed that the recruitment of new workers cannot be carried much further. Therefore, added production must come from increased output per worker. Studies have shown that output can be raised 10 to 20 percent through the redistribution of the labor force. Modernizing present equipment should also lead to more efficient use of the existing labor force.

The devaluation of the pound sterling had an immediate effect on the cotton industry. Two days after devaluation the Raw Cotton Commission published a new price list showing higher prices for nearly all varieties of cotton except the longer stapled Egyptian. United States cotton has been increased by 6.15 pence 3/ per pound, or approximately 26 percent,

1/ Based in part on reports by Kathleen M. Greaves, Clerk, American Consulate, Manchester. 2/ Operatives "on the books." 3/ An English pence is now valued at 1-1/6 U.S. cents.

as against a theoretical 44 percent if full effects of the devaluation were carried out. However, the Raw Cotton Commission's issue price for United States cotton has been out of line on the top side and this partial advance is sufficient to bring it nearly to the replacement level.

The changes brought about in the relationship of rayon prices with those of cotton are perhaps most significant. Before devaluation cotton already was being undersold by British rayon staple. Thus far the price of rayon has remained unchanged at 21 cents per pound or about 13 cents under the cost of American middling 15/16 inch cotton to the British spinners. The possibilities of substitution appear, however, to be limited for the present by available supplies.

Supplies of rayon staple are still rationed although supplies are increasing. The cotton spinning industry consumed 14.5 million pounds of staple during the first quarter of 1949, compared with 11.8 million pounds in the same period of 1948. This would be an equivalent of about 1,000 bales of cotton per month in the first quarter of 1949. Nevertheless, production of rayon in the United Kingdom is increasing. Total output in the first 6 months of 1949 was 134.8 million pounds, of which 50.5 million were staple fiber; it is estimated that the 1949 total will be 275 million pounds, of which 105 million represent staple fiber, and that in 1950 production is likely to reach 370 million pounds, including 160 million pounds of staple.

The United Kingdom must secure over 50 percent of its raw cotton supplies from countries that have not devalued their currencies. Unless offset by subsidies, the price of finished goods must be increased to pay the added cost of cotton from the dollar area. Devaluation will, therefore, put an added burden on the consumers' income not only from increased cost of textiles but also from food which must be imported from dollar areas. By contrast, textile exports from the United Kingdom to importers that have not devalued have been aided. Activity in United Kingdom textile export markets was sharply stimulated and cotton textiles which had been held in suspense in anticipation of devaluation were released. Increased exports to hard currency areas is one of the hoped-for benefits to be derived from devaluation. Until, however, the world economy can adjust itself to the new monetary alignments the full effects of the devaluation cannot be determined.

L A T E N E W S

(Continued from Page 509)

The Group recognized that prices generally were at high levels but that no problem of price and supply called for inter-governmental action at this time, but agreed to continue to meet from time to time in the present form.

(The complete text of the press release, issued by the International Wool Study Group following its meeting, is contained in Foreign Agriculture Circular, FW-5-49, dated November 17, 1949. This circular is obtainable from the Office of Foreign Agricultural Relations, U.S. Department of Agriculture, Washington 25, D.C.).

